



TRITECH SERVICES

EXPERIENCE

THE DIFFERENCE !

WHO IS TRITECH SERVICES?

TriTech Services, a subsidiary of TriTech Software Development Corporation, is a U.S. based company headquartered in Allen, Texas. To meet the needs of our clients, TriTech has transformed itself from a company focused exclusively on tax software to a company that provides a comprehensive range of tax products and services.

Our sixteen years of experience as the leading premium tax software provider gives TriTech the competitive edge. TriTech Services offers tax compliance and consulting services at significantly lower costs while maintaining a high standard of quality.

Our team is comprised of tax and technology professionals who take an active interest in the insurance industry and its dynamic tax environment. We serve as a virtual extension of your office and are always just a click or a phone call away.

Our client base includes 130+ insurance companies domiciled in almost every state in the U.S. Our clients range from large players – many part of the S&P 500 who write premiums of well over \$91 billion annually – to smaller entities, such as start-ups.



TriTech Services combines the cost saving of co-sourcing with the efficiencies of technology to deliver a complete solution.

TAX COMPLIANCE

SERVICES PROVIDES

Premium Tax Services

- Full Compliance Cycle – Preparation/Review/Filing/Payment
- Annual Tax Returns & Estimated
- Payment/Check Cutting Services
- Ocean Marine, Worker's Comp
- Retaliatory Calculation Support
- SAS70 Certified
- Review of all Returns
- Electronic Filing of Returns
- Data Management
- Return Signing
- Miscellaneous Filings

Tax Software - Premium Pro® By TriTech Software

- Visit www.tritechsoft.com for more information

Municipal Tax Services

- Full Compliance Cycle – Preparation/Review/Filing/Payment
- City, County, Districts
- Return Processing
- Review of all Returns
- Full Geocoding of Risk Location
- AL, FL, GA, IL, LA, KY, NY, SC

Premium Allocation Services

- Cost-effective solution, particularly for small companies or small amounts of premium data
- KY HB-524 verified electronic risk location system
- Import files for Premium & Municipal Tax included
- Provides all necessary reports and files
- Avoid penalties from the states due to misallocation

WE CUSTOMIZE TRITECH'S SERVICES FOR YOUR COMPANY'S NEEDS.

We are **Premium Tax** and we do it better than anyone. Our pledge to excellence and exclusive access to the most powerful premium and municipal tax software on the market—Premium Pro®—ensure that we're more thorough, efficient, and effective than our competitors. Tri-Tech Services has one of the most experienced teams of premium tax professionals ever assembled. Our extensive premium/municipal tax knowledge and deep commitment to our clients is unparalleled. We know more and we can save you more.



Don't let tax season be a source of despair.
We are eager to show you what we can do to streamline the process.



YES, TRITECH DOES CONSULTING TOO.

TriTech's consulting team offers a variety of assistance with state and local tax issues. Our goal is to provide competitively priced state tax guidance to our clients. We can help with state income tax compliance, audit issues, planning ideas, mergers & acquisitions, and minimization of retaliatory tax strategies. We offer hourly and contingent fee based agreements. Our tax accountants and lawyers have decades of both insurance and non-insurance state tax experience. When our insurance company clients face new state tax challenges, our consulting staff is ready to offer assistance at any level in a timely and effective manner.

CONSULTING

SERVICES PROVIDES

State Return Reviews

- Evaluation of state filings to determine potential tax savings
- Recommendations and assistance with implementation of suggested strategies

Retaliatory Tax – Minimization Strategies

- Provide recommendations and potential tax strategies to reduce retaliatory taxes
- Assist with implementation

Tax Guidance/Assistance (desk and field audits)

- Provide tax guidance on controversies and administrative procedure assistance

Mergers and Acquisitions

- Transactional analysis
- Line-of-business impacts of retaliation

Planning Issues

- Use of alternative entities to reduce state tax expense
- Development and implementation of potential tax savings strategies
- Litigation and legal assistance

Reverse Audits

- Identify and assess areas of potential audit exposure prior to audit commencement
- Assist with audit notice and protest issues
- Analyze and negotiate matters in undefined areas

Re-domestication

- Provide analysis of potential retaliatory tax reductions that can be obtained through re-domestication
- Recommendations for choosing a favorable state
- Assist with implementation

WHY

TRITECH SERVICES?



#1

- Qualified Professionals with Insurance Tax Experience
- Long-term Client Relationships
- Payment & Remittance
- U.S. Based Company
- Secure Online Access
- Flexibility, Scalability, and Adaptability
- State & Local Taxes
- Specialized Knowledge
- Data Management
- Mitigating Risk

Time and Cost Savings

Some of the greatest benefits of TriTech Services are the immense savings in cost and time for your company and staff. Tax return preparation co-sourcing increases the time you have available to devote to tax planning and decreases time spent addressing data entry and form filing duties. Tax co-sourcing lessens the need for temporary professional staff during the busy season. Utilizing TriTech Services allows you to accomplish more, in less time, with reduced staff, and fewer expenses.

Quality and Experienced Team

At TriTech Services, we focus on quality. We recognize that Insurance Companies and CPA firms want a cost effective co-sourcing solution but do not want to compromise quality. We have made significant investments in our people and processes. Our tax preparation staff consists of experienced professionals and CPAs. In addition, they are well versed on retaliatory calculations, qualified premiums, and guaranty funds, as well as municipal taxes and premium allocation.

Transparent Process

Our web-based client calendaring system allows you to monitor the status and progress of each return. So, although we prepare and review the returns, you are always in control and receive real time progress reports. While a return is in process, you can access your files from anywhere using our Internet-based document management tool. When the return is complete, a tax binder is created and mailed to you for reference and storage. This will include all return materials and documentation used to prepare each jurisdiction.

Secure

Our servers are located at a U.S. based data facility that uses the latest technology to protect your information. Our system allows secure, convenient access to all of your information online, and a log entry is generated each time your information is accessed. Our tax accountants are also bound by comprehensive non-disclosure agreements that require complete confidentiality.